

April 2005

CADDIS Connection

Department of Developmental Services

To Be or Not To Be. . .That Is The Question!

Over the next several months, you will hear terms like “To-Be,” “Swimlane Diagrams,” and “Standard Business Model.” Many of you want to know what these terms mean and how the process will impact you and your regional center.

“To-Be” refers to the future (To-Be) business processes regional centers will implement to support CADDIS. The To-Be business process planning activity is a very important part of a successful transition to the new system, as it helps define how regional centers will change aspects of their current processes within CADDIS. Over the next several months, the Business Process Planning Team, made up of Judy Callahan, Karla English, Terry Jew, Christine Lau, Judi Maus, Barbara Rogers, and Erin Ullrich, will collaborate with regional centers to help define their To-Be business processes by developing a CADDIS Standard Business Model.

Once regional centers receive the Standard Business Model, they will decide how they want to customize the standard processes to suit their needs. The CADDIS Standard Business Model will assist regional centers in defining their specific business processes and provide support in customizing training materials and the delivery of training sessions. The Model will contain:

Swimlane diagrams, or process flows, which visually depict the regional centers’ critical and core business processes for each CADDIS functional area

Key business process questions and considerations

A high level gap analysis to help regional centers develop a plan to implement new business practices based on the business process planning effort.

The information contained in the Standard Business Process Model will be gathered through a series of Business Process Planning sessions scheduled from April 2005 until June 2005. If you have any questions, please check with your regional center’s CADDIS Contact.

The Business Process Planning Team appreciates the significant level of participation from regional centers that are sending volunteers to support this work. Participants play an active part in positioning the regional centers for a successful CADDIS implementation.



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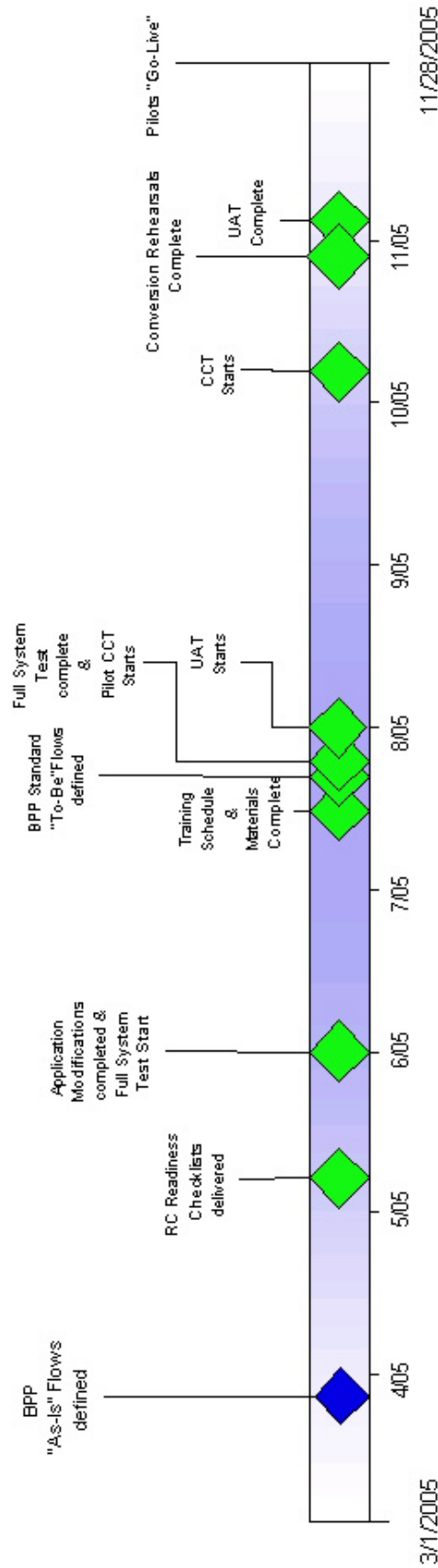
Business Process Planning Meeting	Dates	Location
Consumer	April 12 – 14, 2005	Frank D. Lanterman Regional Center
Provider	April 25 – 27, 2005	San Gabriel/Pomona Regional Center
Quality Assurance	April 28 – 29, 2005	San Gabriel/Pomona Regional Center
Purchase of Service (POS)	May 17 – 19, 2005	Deloitte Consulting Office (Rancho Cordova - Sacramento)
Trust	May 24 – 26, 2005	Deloitte Consulting Office (Rancho Cordova - Sacramento)
Fiscal	June 14 – 16, 2005	Deloitte Consulting Office (Rancho Cordova - Sacramento)

The CADDIS Project Timeline

The CADDIS Project Timeline is a summary of the major milestones in the CADDIS schedule. At a glance, you can see tasks and activities currently under way, along with what's coming up. This first timeline starts at March 1st, 2005 and ends at December 2005. Each month, we will drop off the first month and add another month to the end of the timeline, showing the progress of each milestone. Therefore, in May's newsletter, you will see April 2005 through January 2006.

Green milestone markers indicate tasks or activities in progress. Blue milestone markers indicate completed tasks or activities.

Department of Developmental Services CADDIS Project Timeline



Notes:

1. Business Process Transition Readiness and Regional Center Implementation Planning and Readiness activities are currently underway and will continue through implementation rollouts.

Represents a milestone in progress

Represents a completed milestone

The IFSP/IPP: Online

There has been much discussion about why RCs need to enter IFSP and IPP information into CADDIS, and the advantages of doing so. The linkage between desired outcomes (goals), objectives and services is clearly identified in CADDIS. Every outcome must be tied to a service. While inputting this data may initially take more time, there are many benefits. At the time the outcomes, objectives, and services are documented, a baseline measure of the Consumer's current level of progress is also recorded. At each IFSP/IPP review, it will be much easier to track the Consumer's progress toward desired outcomes as the progress level is updated. The link between the IFSP/IPP, goals, and POS will also assist in streamlining Medicaid waiver workloads, since a consumer must be eligible, as well as receive at least one waiver-billable service to be enrolled. This linkage also facilitates timely and accurate billing for vendorized services and supports. Additionally, the link will assist in the management of quality assurance processes, ensuring that needs are being met, and goals are being achieved.

Alerts can be set up to notify the service coordinator when an IFSP/IPP or review is due. For instance, the service coordinator can be notified 30 days prior to a due date, so he/she can plan the meeting and notify participants. A workflow can be set up so that once the service plan is completed or updated, the supervisor is notified to review it. Review turnaround times may be faster, as the information will be sent electronically, and the reviewer will be notified by the system.

By entering the IFSP/IPP into CADDIS, a complete history of the Consumer's outcomes, objectives, services and providers is on file, online, and all in one place. Paper files won't have to be found and routed to the right person for processing. Moreover, once the basic Consumer identifying information is entered into the system, it does not have to be entered again on any other screen. Finally, CADDIS provides an opportunity to create a "library" of templates for commonly used services. Each RC can create its own templates, which can be edited and customized for each Consumer. This feature may save time for the service coordinator as he/she enters the Consumer's IFSP/IPP into CADDIS.

Q: *What are the methods to search for consumers in CADDIS?*

FAQ

A: There are a variety of ways to search for consumer records in CADDIS. The first-level search on the Consumer Lookup page allows a user to search by last name, or last name fragment and/or consumer ID. If the consumer is not located at the first level, the user can further define the search on the Search Criteria page by entering all or a part of the first/last name, social security number, date of birth, consumer ID, contact name and/or contact type. The initial search is regional center specific; however, if authorized, the user can expand the search to statewide by checking the Full Search box on the Search Criteria page.

Q: *I have noticed from many of the answers to questions in the "Q and A" portion of the CADDIS website that we'll be using "Workflows" to identify and perform many of our daily tasks. What are workflows, what do they do, and who will write them?*

A: **(Corrected Answer)** Workflows are an often-used feature of CADDIS that will automate and simplify your everyday work. Workflows are custom-written system alerts that are returned to a user when the conditions in the workflow have been met. For example, workflows could send alerts when any action item is coming due by some specified number of days, or they could alert a designee (e.g., Primary Staff Person) when work was overdue. Workflows will run overnight in batch due to the intense resources they can require, and alerts will be waiting for users on their CADDIS Homepage when they log on in the morning.

Many workflows are being provided with CADDIS, but regional centers will also write their own to meet the specific needs of their business models. Workflows **can** also contain hyperlinks to take the user to the screen requiring attention. While writing custom workflows can range from the simple to the complex, depending on what the system is being asked to provide, the main skill needed to write them is a good working knowledge of the data model. As this knowledge increases with experience, workflows will be easier to create and their usefulness will constantly improve.

Did You Know?

Did you know in CADDIS you can do a local or statewide search for providers?

You can search by:

- Service Code
- Program Type (day program, respite, transportation)
- Health District
- Zip Code
- City
- County
- State

You can also do an advanced search by:

- Organization Attributes (type of organization)
- Location Attributes (accessibility, hazards, equipment)
- Program Attributes (living arrangement type, service level, staff ratio)
- Staff Attributes (license, certification, language, skills, specialties, gender)
- Capacity Attributes (gender, special populations, accessibility)

Also, you can easily access a summary view of a provider program that will give you:

- Provider Name
- Liaison Name
- Program Type
- Location Summary
- Staff Summary
- Managed By Regional Center (Vendoring RC)
- Status and Effective Date
- Capacity Summary
- Home Summary

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Do you have a suggestion for a CADDIS Connection article or FAQ?
We want to hear it!
Please send your suggestions to *Tamara Wheeler, DDS CADDIS Project*, at
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